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Wealthtech Weekly

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By Rob Burgess
Reporter

I am excited to share that we're restarting "Show Me Your Stack," a series where we catch up with those delivering financial advice to see what solutions they rely on to make it happen.

In this edition, Lawrence Sprung of Mitlin Financial said since his firm became a Carson tuck-in, he's enjoyed the transition away from paper documents, traditional business cards and choosing each piece of his technology stack.

Also, as today is Thanksgiving, let me stop and say how thankful I am for everyone who has read my work this year. You are appreciated. Talk to you next Thursday!

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SHOW ME YOUR STACK

How a Carson tuck-in solved its tech headaches: Show Me Your Stack

The founder of Mitlin Financial said he has enjoyed the transition away from paper documents, traditional business cards and choosing each piece of his technology stack.

- **LPL's AI Advisor Solutions includes four popular vendors**
  LPL's financial professionals now have access to a vetted package of AI-powered tools for their practices.
- **Clients want more from financial services apps, websites**
  Experts say firms that seek to serve technology-savvy clients would do well to provide the digital tools they desire.
- **The future of sustainable investing in Trump's second term**
  The US Sustainable Investment Forum (SIF) sees thin Republican majorities in Congress hampering anti-ESG legislation from advancing.
- **Fidelity's client-cash plans draw industry ire**
  Starting next year, all of its existing RIA non-retirement clients' cash balances will be moved from higher-yield money market funds to FCASH — a lower-yield cash management product.

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